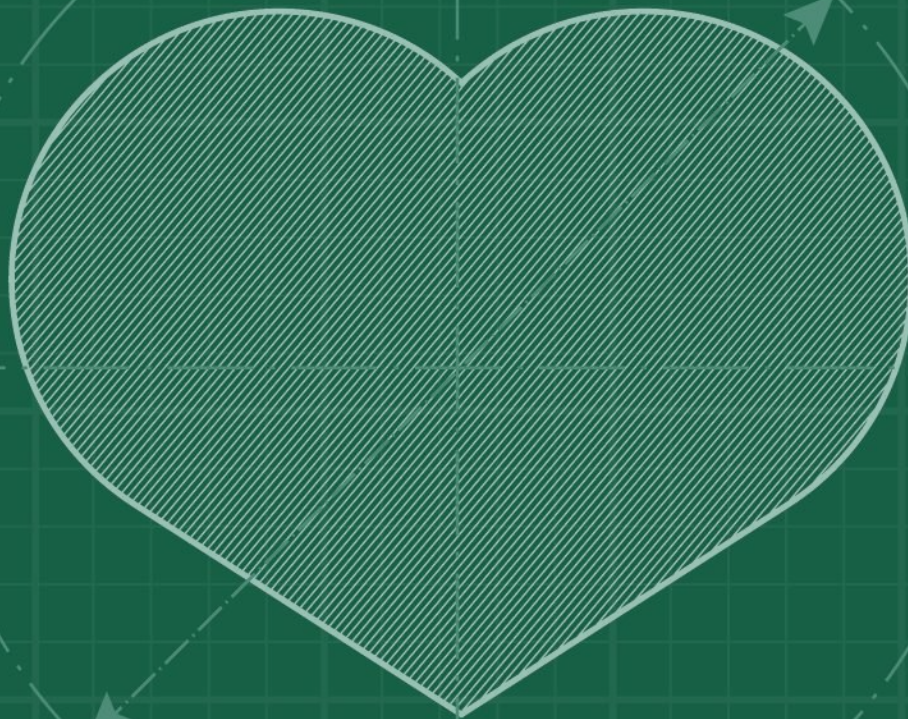


The Monthly Giving Blueprint:

Essential Strategies

Your Quick-Start Guide to Building
a Thriving Sustainer Program



Developed by:

 **FAIRCOM**
new york

x

teal

Why **Monthly Giving** Is Your Organization's Future

Monthly donors are the backbone of sustainable nonprofit funding. The numbers tell the story:

+42%

more annual giving
than one-time donors

80%

first-year retention
vs. 41% for all donors

95%

five-year retention
vs. 23% for one-time donors

**Predictable
Revenue**

that enables **better planning and
program development**

This fundamental gap requires immediate attention, as monthly donor revenue is essential for organizational resilience during challenging periods. Without systematic monthly donor growth, even strong campaign-driven fundraising remains vulnerable to external pressures.

Yet only 14% of nonprofits actively promote monthly giving during the donation process, despite 94% of recurring donors preferring this giving method.

Source: Industry research compiled from Network for Good, M+R, and sector analysis (2023-2024).

The 5 Essential Elements of Successful Monthly Giving Programs

1. Technology Foundation First

Before launching any campaigns, ensure you have:

- Recurring payment processing capability
- Donor database that segments sustainers
- Mobile-optimized donation forms
- Failed payment recovery systems

2. Start with Your Current Supporters

Focus **80% of your monthly giving recruitment efforts** on existing donors rather than new prospects:

- **Target Audience:** Donors who gave 2+ times in past 24 months
- **Sweet Spot:** \$25-\$100 annual donors who give frequently
- **Message:** Emphasize convenience and sustained impact

3. Multi-Channel Integration

The highest-performing programs coordinate across channels:

Email: Primary acquisition and stewardship channel

- Welcome series (~3 emails over 6 weeks)
- Monthly impact updates
- Conversion rate target: 3-5%

SMS: Highest engagement for conversion and retention

- Welcome sequence and exclusive content
- Failed payment recovery (3x higher response than email)
- Conversion rate target: 8-12%

Multi-Channel Integration *(continued)*

Direct Mail: Drives traffic to digital forms

- Include QR codes for mobile donation
- Use for cultivation and premium delivery
- Conversion rate target: 1-2%

Telemarketing: Personal touch for key moments

- Welcome calls increase retention
- Reactivation campaigns: 15-25% success rate
- Annual upgrade conversations

4. Design for Retention from Day One

- **First 90 Days:** Multi-channel welcome series, first impact report, personal thank you from staff
- **Month 4-12:**
Monthly impact updates, exclusive behind-the-scenes content, community-building activities
- **Month 12+:**
Anniversary acknowledgment, upgrade invitations based on giving history, VIP recognition opportunities

5. Measure What Matters

Essential KPIs:

- **Monthly new acquisitions** by channel
- **Retention rates** at 3, 6, and 13 months
- **Average monthly gift amount** and trends
- **Additional gifts** from sustainers and **lifetime value** projections

Success Benchmarks (Top-Performing Programs):

- 13-month retention: **75%+** and failed payment recovery: **60-70%**
- Additional gift rate: **15-25% annually**

CASE STUDY:

Transforming Performance Through Strategic Optimization

The Challenge:

An international humanitarian organization had an established monthly giving program but recognized significant untapped potential in retention rates, cross-channel integration, and donor stewardship.

The Strategic Approach:

Enhanced Donor Experience

Redesigned multi-touchpoint welcome journey

Created branded giving society with exclusive benefits

Introduced mission-driven engagement content

Integrated Multi-Channel Strategy

Coordinated campaigns across email, SMS, direct mail, and telemarketing

Data-driven approach to channel optimization

Consistent messaging and timing across touchpoints

Technology and Process Optimization

Streamlined payment processing and failure recovery

Enhanced donor segmentation and personalization

Improved tracking and analytics capabilities

The Results (Achieved over 13 months):

Performance Improvements:

- **+10% Growth** in Active Sustainers
- **+11% Improvement** in Retention Rate
- **4% Additional Gift Rate** from existing sustainers
- **18% Under Budget** while achieving all goals
- **12% Reactivation Rate** for lapsed sustainers

Channel-Specific Successes:

- SMS campaigns generated **20x higher engagement** than previous efforts
- Telemarketing reactivation achieved **3.4% conversion rate**
- Multi-channel approach **increased donor satisfaction scores**

Universal Lessons:

- **Donor-First Strategy:** Prioritize supporter needs over channel convenience
- **Integration Over Isolation:** Coordinated campaigns outperform siloed efforts
- **Technology Investment:** Proper systems enable sophisticated personalization at scale
- **Test Everything:** Systematic A/B testing reveals surprising insights about donor preferences
- **Long-Term Focus:** Build for lifetime value, not immediate conversion

Quick-Start Action Plan

For Organizations Launching Monthly Giving:

30-Day Foundation:

- Set up recurring payment processing
- Create 3-email welcome series + 2 SMS messages
- Design simple landing page with clear value proposition
- Identify 100 current donors for soft launch

60-Day Launch:

- Test with small group and gather feedback
- Launch to broader donor base via email campaign
- Add SMS opt-in to donation process
- Implement basic failed payment recovery

90-Day Optimization:

- Analyze performance data and donor feedback
- A/B test key elements (ask amounts, messaging, timing)
- Plan first stewardship campaign
- Set goals for expansion

For Organizations Optimizing Existing Programs:

Immediate Wins (Week 1):

- Add SMS component to failed payment recovery
- Create sustainer-specific thank you messages
- Include upsell prompts on one-time donation forms

30-Day Improvements:

- Launch systematic A/B testing program
- Implement donor journey mapping
- Begin upgrade campaign for 12+ month donors

90-Day Strategic Development:

- Develop sophisticated segmentation strategy
- Create exclusive content and experiences for sustainers
- Plan major gift integration for top monthly donors

Note: Timeline may vary based on organizational capacity and resources

Your Next Steps

Monthly giving isn't just a fundraising tactic—it's a relationship-building strategy that creates the predictable revenue foundation your organization needs to plan, grow, and increase impact.

The opportunity is significant. Organizations with strong monthly giving programs see 40-50% of their annual revenue from sustainers, enabling them to weather economic uncertainties and invest in long-term program development.

Success requires commitment. Monthly giving programs need consistent attention, ongoing optimization, and a donor-first mindset that prioritizes relationships over transactions.

Start where you are. Whether you're launching with 25 founding monthly donors or optimizing an existing program to achieve transformational growth, the most important step is the first one.

Your mission deserves the stability that monthly giving provides. Your donors are ready for the convenience and impact that monthly giving offers.

The question is: Is your organization ready to build this sustainable future?

Key Resources

Essential Templates:

- Welcome email series (3 emails)
- SMS message templates (welcome + recovery)
- Donor journey mapping framework
- KPI tracking dashboard

Recommended Testing:

- Ask amount optimization (\$15/\$25/\$35 vs. \$20/\$30/\$50)
- Welcome series timing and content
- Channel integration strategies
- Upgrade messaging and timing

Success Metrics to Track:

- Monthly new acquisitions by source
- Retention rates at 3, 6, 13 months
- Average monthly gift trends
- Failed payment recovery rates
- Lifetime value by acquisition channel

Want the Complete Monthly Giving Toolkit?

This condensed guide gives you the essential framework, but there's much more to explore. The complete 20+ page Monthly Giving Blueprint includes:

Advanced Implementation Resources:

- Complete email and SMS template examples with customization guidance
- Step-by-step 90-day launch calendar with weekly action items
- Comprehensive donor journey mapping worksheets
- Advanced retention strategies and reactivation campaigns
- Complete KPI tracking dashboard templates
- Additional case studies and sector-specific insights

Exclusive Strategic Content:

- Failed payment recovery sequences that can achieve 60-70% success rates
- Upgrade campaign frameworks that can potentially convert 15-25% of existing sustainers
- Cross-channel integration playbooks for organizations of all sizes

Ready to transform your monthly giving program?

Email **Madiha Ahmed, Associate VP of Digital Integration** at mahmed@faircomny.com with the subject line "Monthly Giving Blueprint Request" and she'll send you the **complete guide plus a 15-minute strategy consultation** to discuss how these approaches can be customized for your organization.

This condensed guide was developed based on real-world experience with successful monthly giving programs and industry best practices. Results may vary based on organization size, mission, and implementation approach.

About Our Partnership

Faircom and Teal: Stronger Together.

Our strategic alliance brings together creativity and data, art and science — great storytelling and smart fundraising strategy. Because that's where the magic happens: helping nonprofits build stronger relationships and helping donors feel a deeper sense of purpose and community.

Faircom brings 30+ years of direct response fundraising expertise, with data-driven, mission-aligned approaches to donor engagement that deliver results. Everything we do is led and shaped by people, supported by the power of donor science and AI — all designed to help donors feel a sense of purpose and belonging.

Teal Media believes that brand storytelling is about more than beautiful design or sharp messaging — it's about shaping how people feel and building trust. A great brand opens the door for people to engage deeply with the causes they care about by authentically communicating mission and values.

Together, we're crafting the stories that inform, inspire, and transform communities through the power of giving. When Teal's compelling brand storytelling opens the door, Faircom's data-driven fundraising strategies help people walk through — creating seamless, mission-driven experiences that deepen donor connections and fuel organizational impact.

We're here to be stronger, more nimble partners to the organizations we care about — because your mission matters.

This condensed guide was developed based on real-world experience with successful monthly giving programs and industry best practices. Results may vary based on organization size, mission, and implementation approach.

Learn More About Our Organizations:

Faircom: www.FaircomNY.com

Teal: www.TealMedia.com

Thank You Thank You Thank You

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